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## **Bulgaria**

**Post:** Sofia

### **Fish and Seafood Market Brief - Bulgaria**

**Report Categories:**

Fishery Products

Market Development Reports

Product Brief

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**Report Highlights:**

This report contains information about Bulgaria's fish and seafood market. It provides an overview of market opportunities and key information and statistics about production, imports, exports, and main EU regulations.

## **General Information: OVERVIEW**

The Bulgarian seafood market is smaller one in Europe (population 7.2 million, per capita consumption of fish and seafood of about 5.4 Kilos), but many current and potential suppliers find it attractive and offering many opportunities. Bulgarian importers are actively seeking to expand the selection of fish available on the local market, especially mid- to high-value products. Food service outlets are providing a major impetus for this demand, with an increasing number offering high quality fish as a regular menu item.

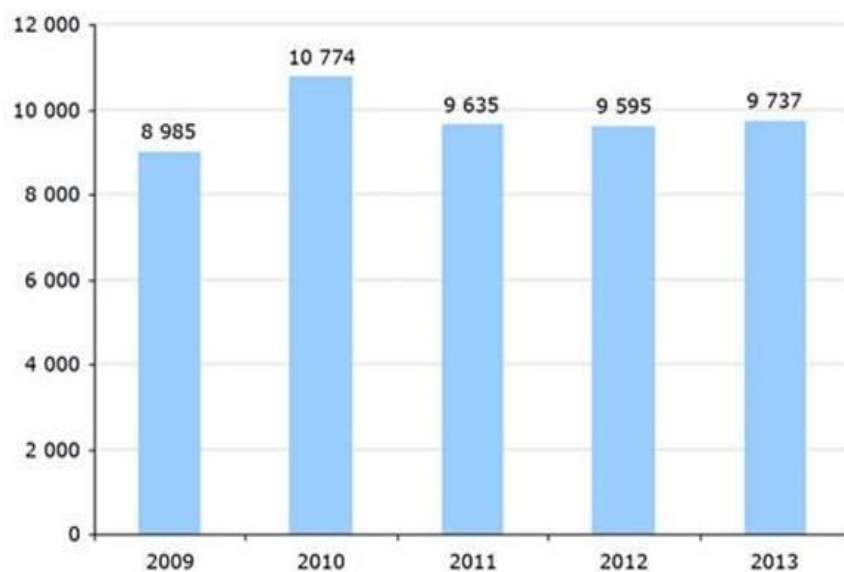
The taste of Bulgarian consumers is currently oriented towards species like carp, rainbow trout, Prussian carp, silver carp, and zander, which represent more than 82% of total fish consumption. Retailers are responding to the demand through imported and domestic supplies. There is an increasing tendency of demand for mid- to high-end species like salmon, squid, lobsters, hake, and mackerel. According to U.S. Customs trade data, Bulgarian imports of U.S. pink salmon, squid, and hake registered record high levels in 2014. U.S. exports of lobster and mackerel have declined slightly in the past year, but there are solid opportunities for growth in demand due to increased consumer awareness. Other opportunities exist for U.S. exports to Bulgaria to be repackaged and sold as value added goods throughout the European Union. A detailed list of importers is attached at the end of this report.

The development of the domestic fish market as well as the introduction of new species in aquaculture could help increase the demand for fish and fish products. Other opportunities are presented through exploration of potential market niches by increasing the share of the valuable and delicacy species, diversification of activities via development of fishing tourism, and conversion of capture fisheries to aquaculture production of more valuable, export oriented species.

According to official statistics, domestic aquaculture production increased from 7,500 tons in 2012 to 12,230 tons in 2013, an increase of more than 61%. However, Bulgaria relies heavily on imports to bridge the gap between steady consumer demand and reduced national output. This means that importers are seeking new suppliers and products to fill the gap.

Changes in the Law on Fisheries and Aquaculture in August 2012 imposed a ban on commercial fishing in in-country water basins. Among other things, this measure aims to differentiate fishing from natural resources (Black Sea and Danube) and aquaculture production.

**Figure 1. Total Catch of Fish and Other Water Organisms in the Country,  
2009 – 2013 (metric tons)**



Source: Bulgarian Executive Agency for Fisheries and Aquaculture

**Table 1. Bulgarian Seafood Production 2013 (metric tons)**

Description	Quantity
Fish fillets and other fish meat (whether or not minced), fresh or chilled	211
Fish, frozen	3,979
Fish fillets, frozen	222
Fish, dried, whether or not salted, or in brine	464
Fish, including fillets, smoked	244
Fish, otherwise prepared or preserved, except prepared fish dishes	4,312
Caviar and caviar substitutes	199
Crustaceans, frozen	111
Molluscs, frozen, dried, salted or in brine, smoked	560
Crustaceans, otherwise prepared or preserved; molluscs and other aquatic invertebrates, otherwise prepared or preserved	1,928
<b>Total:</b>	<b>12,230</b>

*Source: Bulgarian National Statistical Institute*

## **Black Sea Fisheries**

The Bulgarian fisheries sector is fragmented along its 240 miles of coastline. In recent years marine caught (capture) fishery levels has increased. The main Black Sea catch is comprised of European Sprat and Conch as well as the production of mussel farms. The Bulgarian fishing fleet is considerably small in size with 2,025 vessels in 2013. The Black Sea catch increased by 16.5% in 2013 to reach 9,507 tons, as compared to 8,161 tons in 2012. Traditionally, catch of European sprat is the highest, with 33.4% increase in 2013 at 3,784 tons. The catch of red mullet almost doubled in 2013 at 257 tons.

**Table 2. Black Sea Catch by Species 2013 (metric tons)**

<b>Specie</b>	<b>Quantity</b>
Shellfish (Conch, Mussel, Shrimp)	4,843
European Sprat	3,784
Scad (Horse Mackerel)	271
Goby	74
Red Mullet	257
Bluefish	49
Turbot	40
Thornback Ray	56
Spiny Dogfish	31

*Source: Bulgarian Executive Agency for Fisheries and Aquaculture*

## **Freshwater Fisheries**

Bulgaria has over 200,000 HA of lakes, reservoirs and rivers, which account for 1.8% of the total territory of the country. The longest river is Danube with length of 470 km., followed by the Iskar (368 km.), Maritsa (321 km.), Kamchia (245 km.), and other smaller rivers. There are more than 400 lakes covering more than 100 square kilometers.

The catch from the Danube has increased by more than 16% in 2013 to reach 129 tons, as compared to 111 tons in 2012. The main species were silver carp (24.3 tons), common carp (15.4 tons), barbell (14.6 tons), common bream (13 tons), and Prussian carp (12.7 tons). The highest increase in catch, compared to the previous year, has been registered for Prussian carp (more than 50%), while the barbell and common bream catch have decreased respectively by 24% and 4%. In January 2012 the Minister of Agriculture and Food imposed a ban on fishing, transporting, and selling of fish of the sturgeon group and their sub-products. The ban is imposed for four years and aims at preservation and restoration of the Danube sturgeon species.

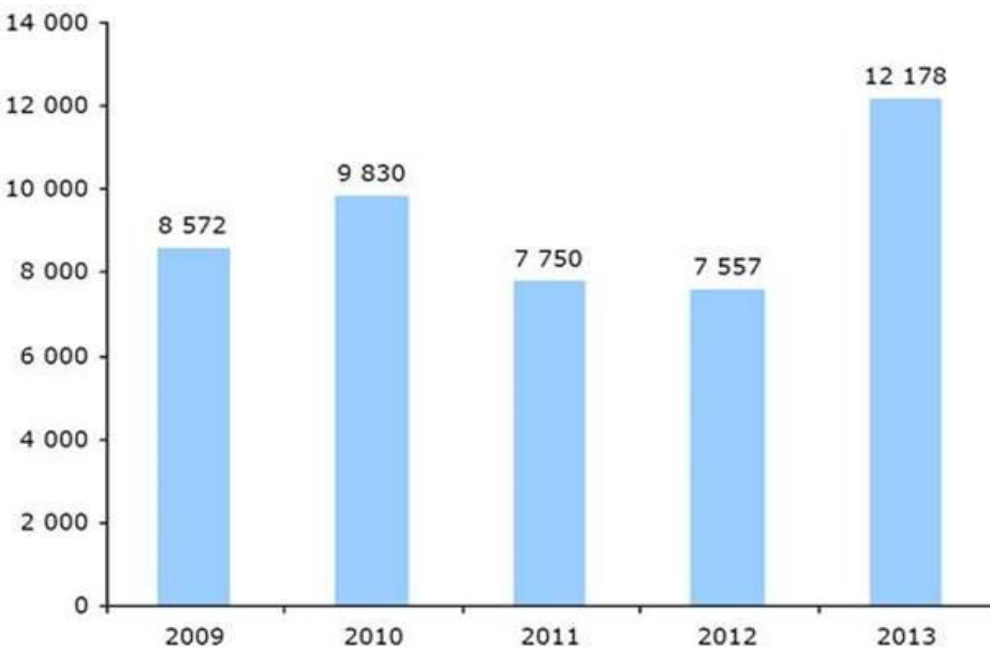
## **Aquaculture**

In 2013 total aquaculture production increased by 59.4% to 2,504 tons, compared to the previous year. This is mainly due to increased production of the two main species, common carp (up more than 250%

at 1,171 tons) and silver carp (up by 38% to 403 tons).

2013 recorded an increase of total capture fisheries production of fish and other water organisms for consumption at 12,178 tons, an increase of 61.1% compared to 2012 (Figure 2). About 90% of aquaculture production in Bulgaria is represented by the species of the carp group (common carp, silver carp, bighead carp, and grass carp), and trout group (mainly rainbow trout). The production of all these species has increased in 2013. It is the most notable in silver carp (200%), carp (89%), and rainbow trout (11.2%).

**Figure 2. Total Capture Fisheries Production, 2009 – 2013 (tons)**



The production of other high-quality local species is insignificant and is represented mainly by brown trout, northern pike, and tench. Recently, diversification of the produced species has included species such as barramundi, African sharptooth catfish, sturgeon.

The main species subject to marine aquaculture is the black mussel. In 2013 black mussel production has increased twice as compared to the previous year, reaching 1,787 tons. Crayfish production increased to 32.4 tons as well.

According to the Bulgarian Executive Agency for Fisheries and Aquaculture (BEAFA), the total number of fishery businesses at the end of 2013 was 510, of which 470 were in fresh water aquaculture and 40 in marine aquaculture. In 2012 the number of fishery businesses was 388.

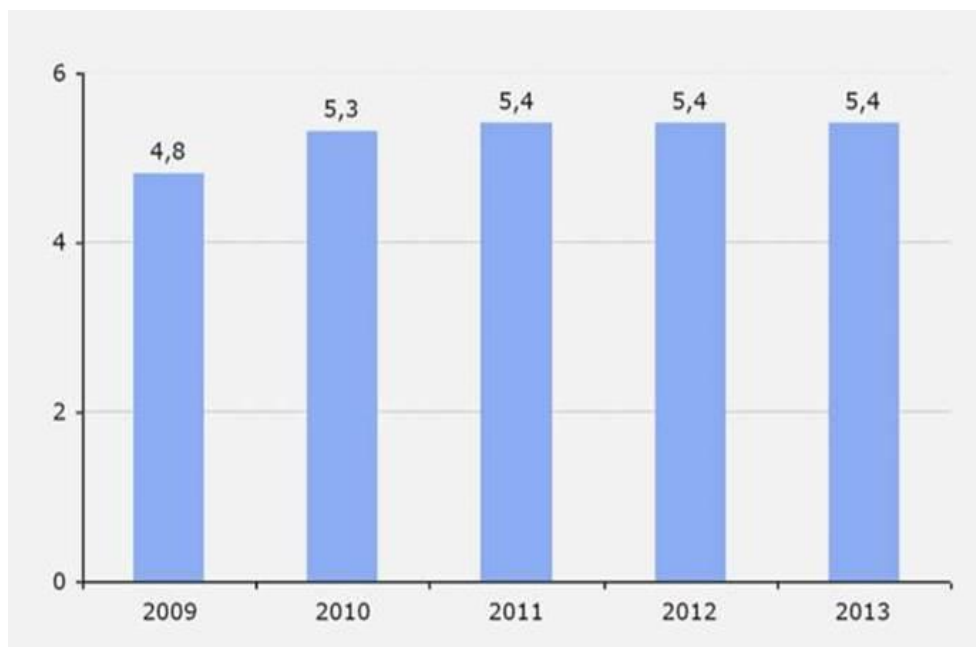
It has been forecast that in the following years the number of fishery businesses will increase as new and modern production facilities are established under the EU “Fishery” program.

### **Consumption**

Fish consumption in Bulgaria is rather moderate on a per capita basis and is below the EU average level. Per capita household fish consumption in 2013 was 5.4 kilos. This number does not include consumption in restaurants. Cumulative consumption per capita, including the consumption in restaurants, is estimated at 8.9 kg. Although the consumption level has remained stable for the last three years, the industry forecasts that it will increase slightly, despite increasing wholesale and retail prices of fish and fishery products, due to rising consumer incomes.

Bulgarian prices are determined mainly by movements in the international market as well by the imposed ban on commercial fishing in Bulgarian internal water basins. In 2013 higher prices are most notable for Atlantic bonito (up by 51.5%) and herring (up 43.3%), and least for zander (2.2%). It's expected that the prices of the main species will remain stable in 2015. For the traditional species in Bulgaria, prices will depend mainly on the catch size and domestic aquaculture production, while for imported species it will be determined by the import prices.

**Figure 3. Average Per Capita Household Consumption of Fish and Fishery Products, 2009 – 2013 (kg)**

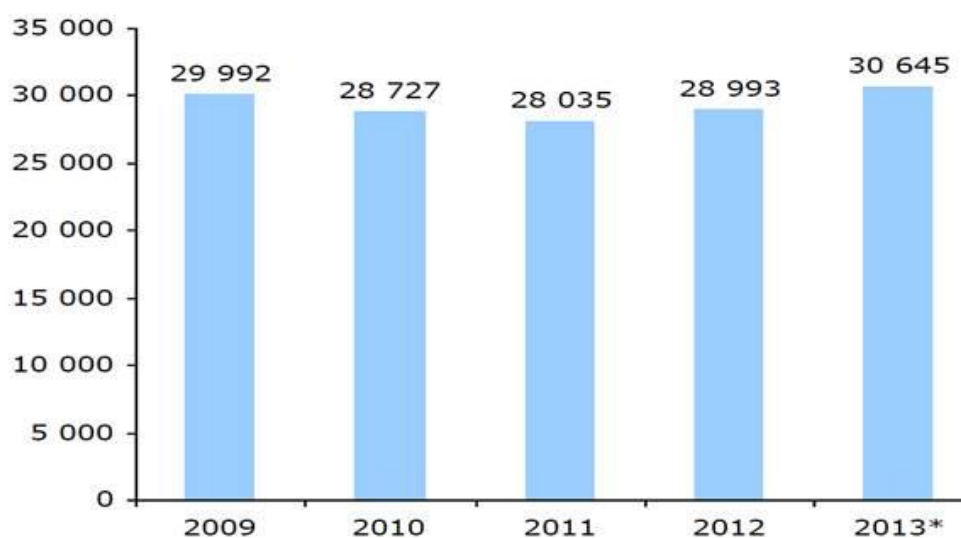


Source: Bulgarian National Statistical Institute

### Import of Fish and Fishery Products

According to the Bulgarian National Statistical Institute data, the total imports of fish and fishery products in Bulgaria in 2013 is 30,645 tons, which represents an increase of 5.7% compared to 2012. This number accounts for increase of imports of fish and fishery products and processed fishery products (see figure 4).

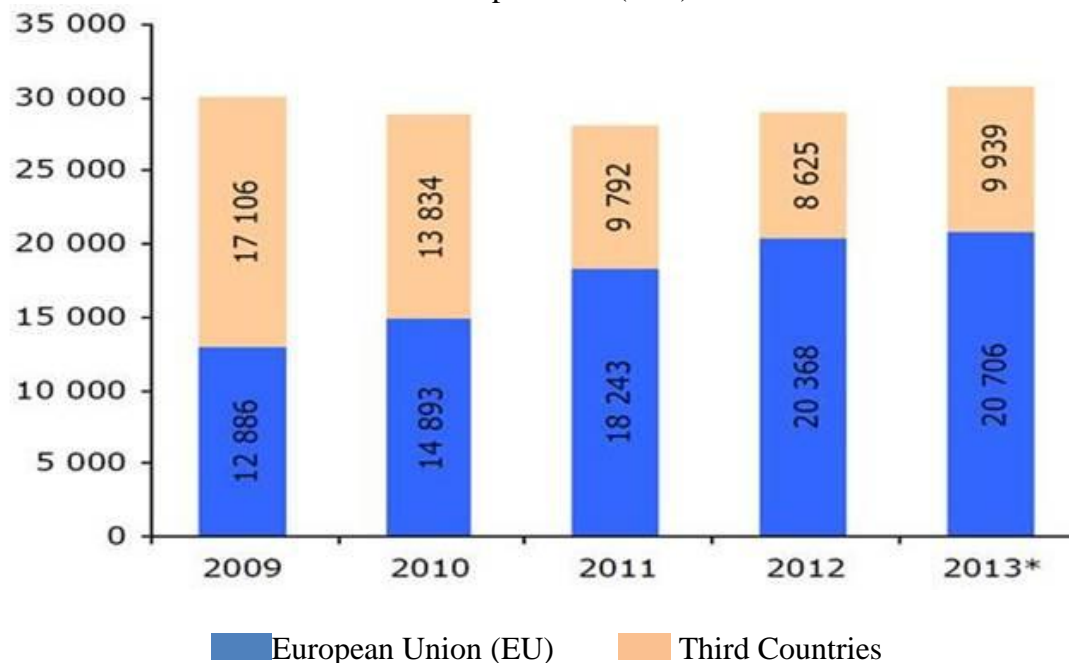
**Figure 4. Import of Fish and Fishery Products, 2009- April 2014 (tons)**



Source: Bulgarian National Statistical Institute

Almost 68% (20,706 tons) of total imported fish is from the European Union (EU) countries. The main imports in 2013 are from Spain (3,600 tons), Netherlands (2,300 tons), Greece (2,200 tons), Belgium (1,400 tons), and the United Kingdom (1,300 tons). Imports from third countries grew in 2013 by 15.2% compared to 2012. The main partners were Vietnam (2,900 tons), China (1,500 tons), Thailand (800 tons), Peru and Argentina (500 tons each). There is a notable increase of imports from the United States to almost 450 tons in 2014.

**Figure 5. Import of Fish and Fishery Products from EU and Third Countries, 2009- April 2014 (tons)**



Source: Bulgarian National Statistical Institute

Imports for 2013 include: 26,953 tons of fish and 3,691 tons of processed fishery products (fish cans, caviar, canned crustaceans and mollusks).

Frozen fish, excluding fillets, accounts for more than half of the total fish imports in 2013 – 17,127 tons, which is 5.1% more than the previous year. As in the previous years, the imports by species are dominated by frozen mackerel – 11,052 tons in 2013, down 4% compared to 2012. Due to a lack of catch of mackerel in Bulgaria, the import of frozen mackerel satisfies the market demand for direct consumption and of the processing industry.

2013 saw relatively big imports of the following species: sardines, sprat (541 tons); herring (1,471 tons); European hake (523 tons); Pacific and Atlantic salmon (234 tons); trout group (137 tons); dogfish (132 tons). Fish imports from the U.S. mainly consist of pink and chum salmon (116 tons), loligo squid (120 tons), Alaska pollock (67 tons), hake (47 tons), mackerel (29 tons), and lobsters (4 tons).

The import of processed fishery products in 2013 increased by 27.6% compared to 2012, to reach 3,691 tons. The import of canned crustaceans and mollusks increased by 30.4% to 574 tons in 2013.

The main supplier of fish and fishery products in the first four months of 2014 remained the EU with 7,106 tons (71% of the total imports for the period), which represents a slight increase of 0.1%



compared to the same period in 2012. The import from third countries increased by 1.2% to 2,920 tons for the same period.

**Table 3. Import of Fish and Fishery Products by Type, 2012 – April 2014 (tons)**

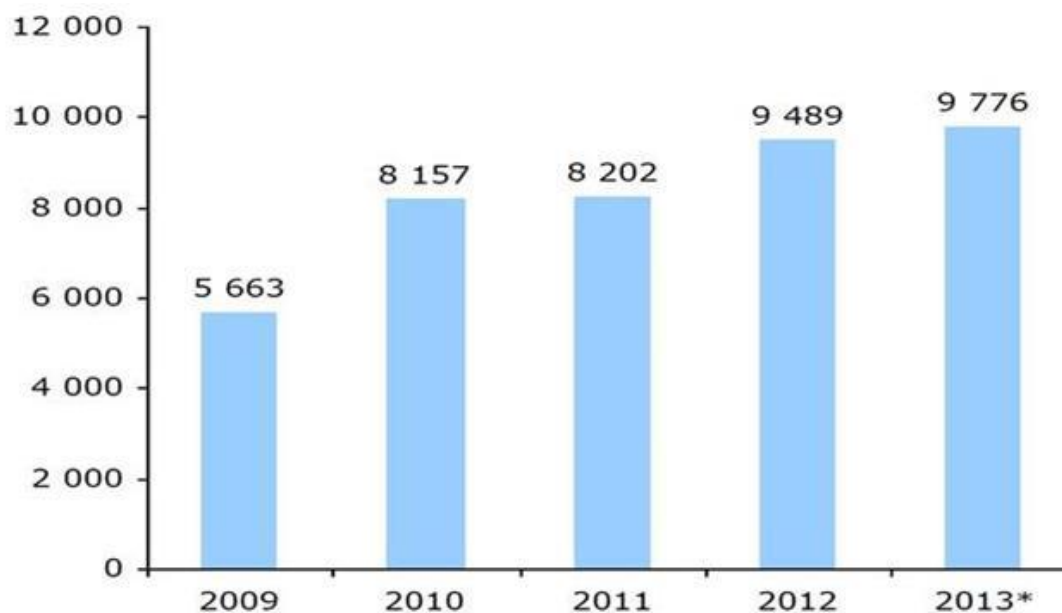
<b>Product</b>	<b>2012</b>	<b>2013</b>	<b>Change 2013/2012</b>
<b>Fish, fillet, crustaceans, mollusks, incl:</b>	<b>26,122</b>	<b>26,953</b>	<b>3.2%</b>
Live fish - fresh water and marine	16	11	-32.9%
Fish - fresh and chilled, excluding fil	3,069	3,128	1.9%
Fish - frozen, excluding fillet	16,299	17,127	5.1%
Fillet and other fish meat - fresh, chilled, or frozen	4,501	4,721	4.9%
Fish - dried, salted, smoked	449	313	-30.2%
Crustaceans	270	751	177.9%
Mollusks	1,519	804	-47.1%
Water invertebrate, other than crustaceans and mollusks	-	99	0.0%
<b>Processed fishery products, incl:</b>	<b>2,871</b>	<b>3,691</b>	<b>28.6%</b>
Ready food, caviar, fish cans	2,431	3,118	28.3%
Canned crustaceans and mollusks	440	574	30.4%
<b>Total fish and other water organisms and fishery products</b>	<b>28,993</b>	<b>30,645</b>	<b>5.7%</b>

*Source: Bulgarian National Statistical Institute Data, Through Ministry of Agriculture and Food*

### **Export of Fish and Fishery Products**

According to Bulgarian National Statistical Institute data, the total export of fish and fishery products from Bulgaria in 2013 is 9,776 tons, an increase of 3% over 2012. This is due mainly to the increase of catch and production as well as realized re-export of imported fish – mainly mackerel (see figure 6).

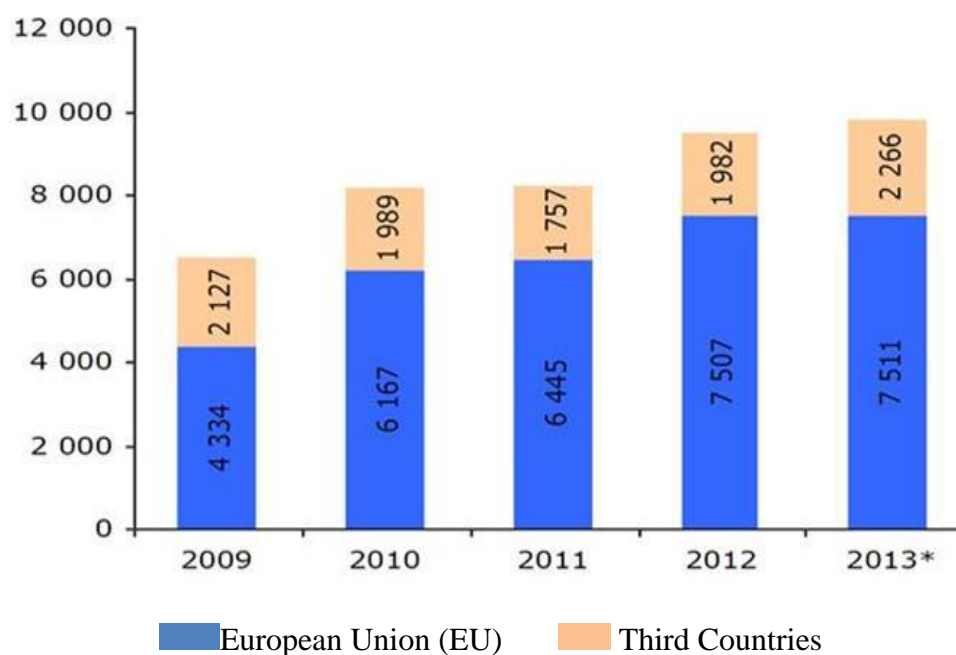
**Figure 6. Export of Fish and Fishery Products, 2009- April 2014 (tons)**



Source: Bulgarian National Statistical Institute

In 2013 export of Bulgarian fish and fishery products to the EU remained at the level of 2012 with 7,511 tons, 77% of total exports. The main destinations were Romania (4,400 tons), Sweden (1,300 tons), and Greece (1,000 tons).

**Figure 7. Export of Fish and Fishery Products to EU and Third Countries, 2009- April 2014 (tons)**



*Source: Bulgarian National Statistical Institute*

Despite the challenging economic situation and heavy competition, exports to third countries in 2013 increased by 14.3% to 2,266 tons with main destinations the Republic of Korea, Japan, Serbia, Russia, and Turkey. Traditionally, the export of frozen fish to Romania was the highest (1,800 tons). The export of mollusks was down 13% in 2013 to 1,538 tons. Main markets for these products were the Republic of Korea, Japan, Greece, and Bosnia.

In the third place in terms of volume was the export of canned crustaceans and mollusks with 1,393 tons – mainly shrimp (993 tons) and mollusks (286 tons). Main destinations for these products were Sweden (991 tons), Japan (176 tons), Republic of Korea (77 tons), and Romania (63 tons).

According to the National Statistical Institute data, export of fish and fishery products between January and April 2014 has increased by 12.4% to 2,634 tons.

**Table 4. Export of Fish and Fishery Products by Type, 2012 – April 2014 (tons)**

Product	2012	2013	Change
			2013/2012
<b>Fish, fillet, crustaceans, mollusks, incl:</b>	<b>7,164</b>	<b>7,071</b>	<b>-1.3%</b>
Live fish - fresh water and marine	682	761	11.6%
Fish - fresh and chilled, excluding fillet	1,254	1,128	-10.1%
Fish - frozen, excluding fillet	2,904	2,662	-8.3%
Fillet and other fish meat - fresh, chilled, or frozen	380	560	47.6%
Fish - dried, salted, smoked	173	322	86.2%
Crustaceans	46	54	16.7%
Mollusks	1,726	1,538	-10.9%
Water invertebrate, other than crustaceans and mollusks	-	47	
<b>Processed fishery products, incl:</b>	<b>2,325</b>	<b>2,706</b>	<b>16.4%</b>
Ready food, caviar, fish cans	638	1,312	105.7%
Canned crustaceans and mollusks	1,687	1,394	-17.4%
<b>Total fish and other water organisms and fishery products</b>	<b>9,489</b>	<b>9,776</b>	<b>3.0%</b>

## EU Common Fisheries Policy

Bulgaria's fish and seafood industry follows the EU Common Fisheries Policy (CFP). The CFP is a set of rules for managing European fishing fleets and for conserving fish stocks. Designed to manage a common resource, it gives all European fishing fleets equal access to EU waters and fishing grounds and allows fishermen to compete fairly.

Stocks may be renewable, but they are finite. Some of the EU's fishing stocks, however, are being overfished. As a result, EU countries have taken action to ensure the European fishing industry is sustainable and does not threaten the fish population size and productivity over the long term.

The CFP was first introduced in the 1970s and went through successive updates, the [most recent](#) of which took effect on 1 January 2014.

The CFP aims to ensure that fishing and aquaculture are environmentally, economically and socially sustainable and that they provide a source of healthy food for EU citizens. Its goal is to foster a dynamic fishing industry and ensure a fair standard of living for fishing communities.

The CFP has 4 main policy areas:

- [Fisheries management](#)
- [International policy](#)
- [Market and trade policy](#)
- [Funding of the policy](#)

For further information on the CFP please see the EU website [here](#).

## **Labeling**

EU legislation requires that all products, including seafood, offered for retail sale in the EU must be properly labeled. The Publications Office of the European Union issued a pocket guide to the EU's new fish and aquaculture consumer labels. It explains what must appear on the new labels and what additional information can be displayed. The pocket guide can be accessed through this [link](#). For further information, please consult the legislation listed on page 15 and the provided links.

## **Import Tariffs**

All EU Member States apply the same tariff on goods imported from outside the EU. The import duty rate is determined by the classification of a good in the EU Tariff Schedule (last update published in Official Journal L 312 – Oct. 31, 2014) and by the customs value.

For the customs classification of goods, the EU uses the Combined Nomenclature (CN) established by Council Regulation 2658/87. This eight-digit coding system is based on the Harmonized System (HS) which is also the basis for the import and export codes used by the U.S.

The full list of fish and seafood products duties can be found in Chapter 3 (page 52-73) [here](#).

**Bulgarian Fish and Seafood Importers** - a list of the main Bulgarian fish and seafood importers can be found in the attached Excel file.

**Table 5. English/Bulgarian Names of Fish and Shellfish**

Alaska pollock	Минтай
Anchovy	Аншоа
Anglerfish	Морски дявол
Atlantic bonito	Паламуд
Barbell	Мряна
Barramundi	Барамунди
Bass	Костур
Blue fish	Лефер
Brown trout	Речна пъстърва
Carp	Шаран
Cod	Треска
Common bream	Платика
Common carp	Бял толстолоб
Conch	Рапан
Crawfish	Рак /речен/
Crayfish	Рак /езерен/
Danube herring	Карагъоз
Eel	Змиорка
European hake	Мерлуза

European Sprat	Цаца
Gilthead bream	Ципура
Goby	Попче
Grass carp	Бял амур
Gurnard	Тригла
Herring	Херинга
Jackfish	Щука
Lobster	Омар
Mackerel	Скумрия
Mullet	Кефал
Mussel	Мида
Needlefish	Морска игла
Octopus	Октопод
Oyster	Стрида
Prussian carp	Сребриста каракуда
Rainbow trout	Дъгова пъстърва
Ray	Скат
Red mullet	Барбун
Scad	Сафрид
Sea wolf	Лаврак
Shrimp	Скарида
Silver carp	Пъстър толстолоб
Spin dogfish	Бодлива акула
Squid	Сепия
Sturgeon	Есетра
Swordfish	Риба-меч
Tench	Лин
Thornback ray	Морска лисица
Trout	Пъстърва
Tuna	Тон
Turbot	Калкан
Zander	Бяла риба

**Exchange Rate: \$1 = BGN 1.8 (April 2015)**

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**End of Report**